



Big "I" Alliance Contacts



**Tiffany
Overlease**

AVP, Big "I"
Alliance Gold and
Blue Plus



**Mary
Venhaus**

Director, Big "I"
Alliance Gold



**Summer
Cole**

AVP, Agency
Development,
Big "I" Alliance
Blue




**Nancy
Doherty**

AVP Agency
Development,
Big "I" Alliance
Blue



**Paul
Claussen**

Director,
Agency
Recruitment



BLUEBLUE PLUSGOLD

LOGIN

Welcome to the Alliance.

Powerful market access. Deep vendor discounts. An alliance aggregation opportunity.

ALLIANCE BLUE.

Placement Center,
Formerly Big "I" Markets

LEARN MORE

- Placement center

ALLIANCE BLUEPLUS.

Vendor Discounts

LEARN MORE

- Exclusive vendor discounts
- Must be registered for Blue

ALLIANCE GOLD.

Strategic Carrier Alignment,
Contract Required

LEARN MORE

- Placement center
- Exclusive vendor discounts
- Strategic carrier alignments
- Contract required





ALLIANCE BLUE.

Placement Center

Market access portal for one-off products (formerly Big "I" Markets)

- Simple registration process
- Agents own their expirations
- No access or termination fees
- No volume commitments
- Competitive commissions





ALLIANCE BLUE.

www.bigimemberalliance.com/blue

- ▶ AFFLUENT PROGRAM
- ▶ AUTO & HOME STANDARD MARKETS
- ▶ BONDS
- ▶ COALITION CYBER
- ▶ COMMERCIAL AUTO
- ▶ COMMUNITY BANKS BUSINESS INSURANCE PROGRAMS
- ▶ CRUMP LIFE INSURANCE SERVICES
- ▶ EXECUTIVE RISKS
- ▶ FLOOD
- ▶ HABITATIONAL
- ▶ JEWELRY INSURANCE
- ▶ NON-STANDARD MARKETS
- ▶ REAL ESTATE AGENTS / PROPERTY MANAGER E&O
- ▶ SMALL COMMERCIAL
- ▶ UMBRELLA & HOME BUSINESS



ALLIANCE BLUE.

Coming Soon!

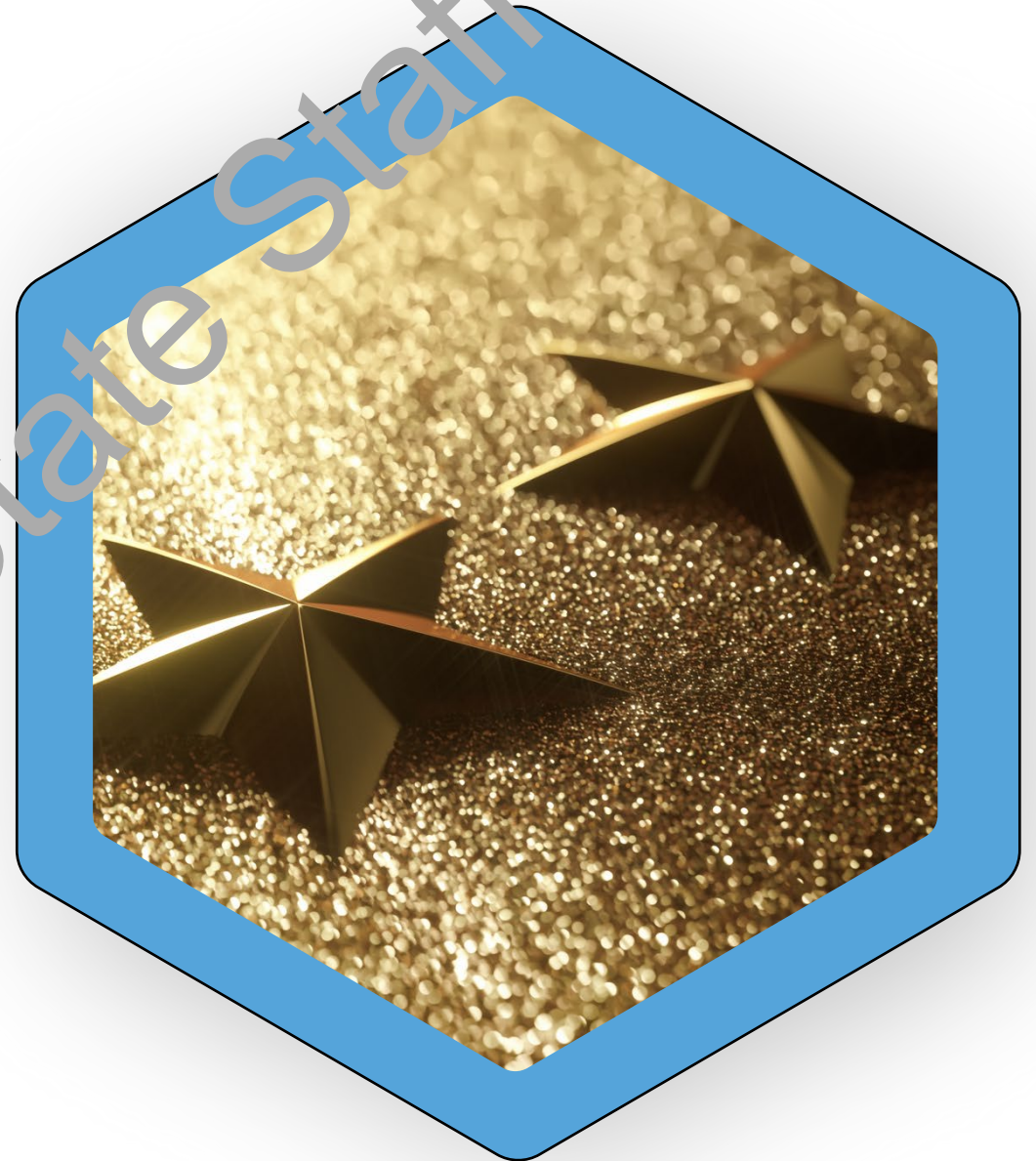
- Completely revamped Big "I" Markets/Blue website with back-end administration features
- Improved user experience
- Enables states to pull member utilization data – individual and aggregate
- Has capability to host state specific products



ALLIANCE GOLD.

Reasons to Join

- Access to markets as carriers open for new appointments, or through Blue registration.
- Agency earns 100% of the commission, paid directly to them.
- Agency owns expirations, carrier codes and receives downloads.
- Achieve higher commission structure when aggregating production with core carriers.
- Potential to earn increased profit in higher production.
- Receive broad communication from carriers.
- Access to vendor discounts.
- Optional participation in an E&O Alliance program.



Ideal Gold Agency Prospect

First line of screening – Complete pre-application/interest form

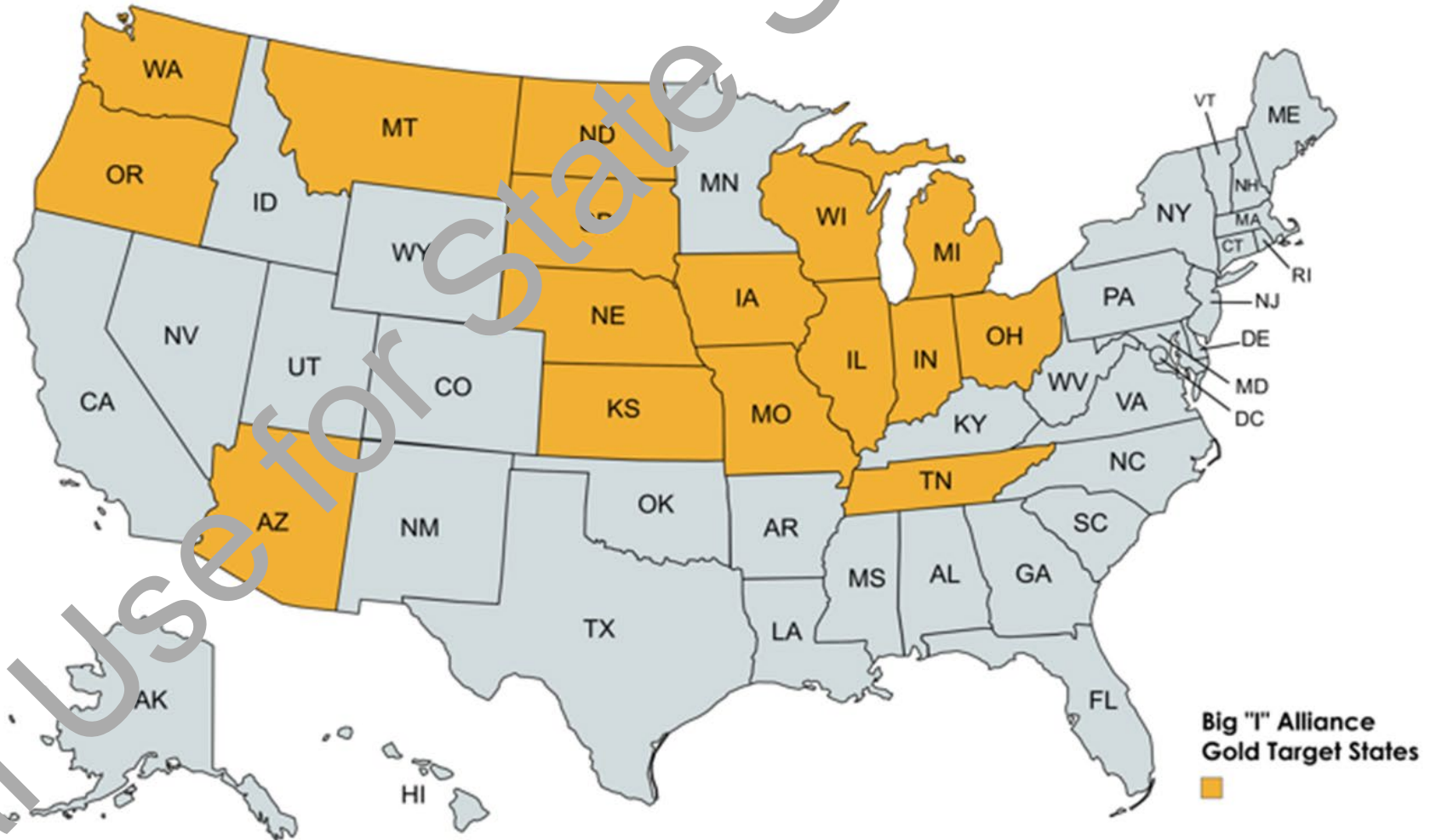
- Is not a member of another Alliance group
- Currently writes business with 1+ Gold carriers
- Has ten or fewer employees
- Utilizes an Agency Management System

Second phase – Consultation with Gold team member (Paul or Tiffany)

- Conduct a needs assessment – Will Gold meet their objectives?
- Determine carrier appetite in that jurisdiction
- Examine profitability of current book of business
- Evaluate agency growth trends
- Calculate possible profit-sharing earnings if enrolled in Gold.



2024 Target States – Phase 1



*Open for consideration if
prospect agency is located
outside of identified states



ALLIANCE GOLD.

Member Agreement

- Initial three-year contract; automatically renews each year thereafter.
- \$2,500 one-time sign-up fee
- \$250/month fee
- Termination/Buyout: 120 days written notice & monthly membership fee for remaining contract. Premiums stay until Jan. 1st of following year.
- Profit Share – Sliding scale





Typical Network/Alliance/Aggregator Costs

Feature	BIG "i" Alliance Gold
Entry fee	\$2,500
Monthly fee	\$250
Contract duration	Three years, then renewed annually automatically. Cancellable with 180 days' notice, though book not transferable until beginning of next calendar year.
Exit Fee	None after <u>three year</u> contract term; otherwise, must pay remaining monthly payments for current contract term.
Commission split	100% with appointed carriers
Profit sharing split	Sliding scale based on volume and years in alliance.
Policy ownership	Agency owns expirations
Carrier code ownership	You take your agency code with you should you decide to leave; no individual BORs needed when moving book. However, codes are not released until following January 1.
Agency Management System	You choose and maintain your own; no requirement to use and pay for master AMS
Agency E&O insurance	Your choice with ability to participate in group program

AAS – Member Market Access

Two distinct ways for members to access markets:



Sub-producer of Blue (IIAA AAS)
No volume commitments
No fees
Simple registration
Split commission
Business submitted through Blue portal



Carrier appointments
Committed to growing books
Registration and monthly fees
Vetting process
Full commission
Direct access to carrier systems
Profit sharing potential

Company Partners

Acuity

Arlington Roe

Berkley Management

Branch

Bristol West

Coalition

Chubb

Cowbell Cyber

Crump Life

Delos

Employers WC

Foremost Choice

Foremost Signature

Forge

Hanover CL

Hartford Commercial

Jewelers Mutual

Liberty Mutual

National General

Openly

Pie

Propeller Bonds

Safeco

Steadily

Travelers PL

Travelers Commercial Select

WeSure

US Assure



BIG i®
ALLIANCE GOLD.



AGENCY OPERATIONS AND TECHNOLOGY SOLUTIONS



APPLIED



Canopy
Connect



EZLynx

EPIC QUOTES



HAWKSOFT

AGENCY MANAGEMENT SYSTEM



PL Rating



Talage



ReferenceConnect



Vertafore



ZYWAVE
INSURING GROWTH

AGENCY SUPPORT



BIG i
AGENCY DEVELOPMENT



Trusted Choice
AGENCY SUPPORT



aben
Agency & Business Education Network



PFS



The Institutes
REGULATORY & COMPLIANCE GROUP

HIRING/STAFFING



BIG i
HIRING



cover desk



elevate teams

MARKETING CO-OP



Trusted Choice
AGENCY SUPPORT

MARKETING SUPPORT



AR Agency
Revolution



brightfire



MARKET RETRIEVERS
YOUR MARKETING PARTNER



PFS

PREMIUM FINANCE SOLUTIONS



ALLIANCE BLUE PLUS.

Agency Resources

Agents have access to exclusive pricing with vendor partners

- Agency Operations & Technology Solutions
- Agency Support
- Education
- Hiring/Staffing
- Marketing Co/Op
- Marketing Support
- Premium Finance Solutions

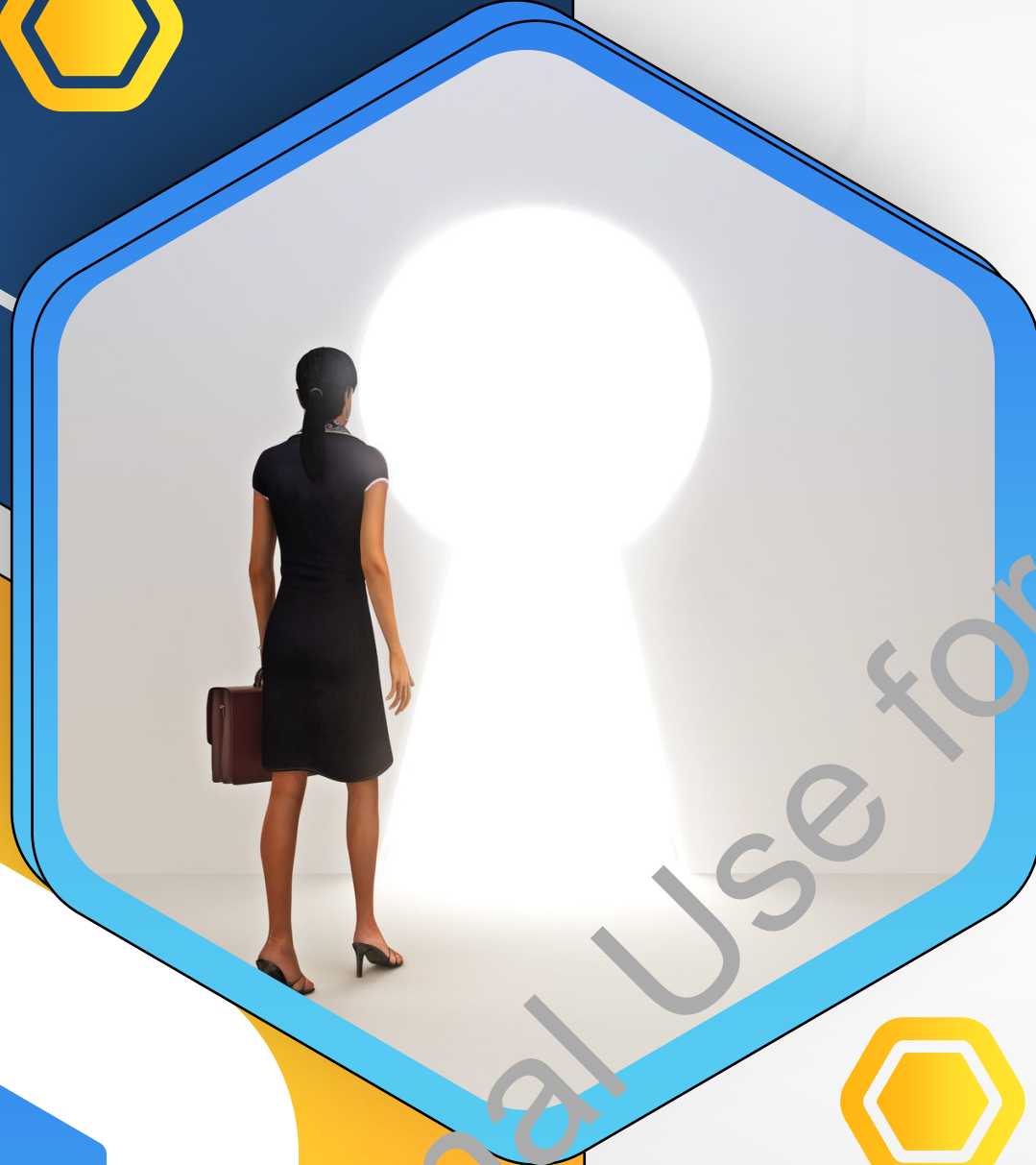
\$100 annual fee

- Not charged until ready to move forward with vendor
- Payment will be made through ePay
- Renewal invoice is sent 60 days prior to renewal to member



Key Talking Points

- **Breadth of carrier access**
- **Low registration fee**
- **Small monthly fees**
- **100% commission earned**
- **Carrier code ownership**
- **Freedom to choose AMS**
- **Friendly contract exit terms**





PROFESSIONAL LIABILITY.

- Gold members are eligible to participate in a Big "i" Professional Liability Agency Alliance E&O program.
- Gold staff will reach out to the state E&O Program Manager 90 days in advance of current policy expiration to outline features and process.
- Contact your E&O Program Manager for more information on the product and workflow.



IS YOUR AGENCY READY TO JOIN AN ALLIANCE?

Big "I" Alliance was created to assist independent agents gain market access through membership. Our objective is to aggregate premium, identify opportunities for growth, promote profitability, and provide broad communication and training to agency members on behalf of our carrier partners.

Big "I" Alliance Gold benefits include:

- DIRECT ACCESS TO CARRIER SYSTEMS AND UNDERWRITERS
- PROFIT SHARING AND INCENTIVE ELIGIBILITY
- OWNERSHIP OF EXPIRATIONS AND CARRIER CODES
- NATIONAL AND REGIONAL CARRIER PARTNERSHIPS
- OPTIONAL PARTICIPATION IN A MASTER AGENCY E&O PROGRAM
- VENDOR PARTNERSHIPS

100% COMMISSION

PROFIT BONUSES

\$2500 START-UP FEE

\$250/MONTH

YOU OWN THE BOOK

APPLY TODAY AT INDEPENDENTAGENT.COM/ALLIANCE

Gold Guide

FAQ

WHAT IS BIG "I" ALLIANCE GOLD?
Big "I" Alliance Gold is an alliance created to assist independent agents to gain market access through membership.

WHO CAN PARTICIPATE?
You must be a member of your Big "I" state association and qualify to join based on the agency requirements set by the alliance. Learn how to join your state association at independentagent.com/BELONG.

IS THERE A CONTRACT?
Yes. When the agency makes the decision to join Big "I" Alliance Gold, they are committing to a 3-year contract that will automatically renew annually each year after.

IS THERE A SIGN-UP FEE?
Yes, there is a \$2500 one-time fee.

WHAT IS THE MONTHLY MEMBERSHIP FEE TO JOIN BIG "I" ALLIANCE GOLD?
\$250/month. This fee is separate from the state Big "I" membership fee.

IS THERE A BUYOUT/TERMINATION OPTION?
Yes.

HOW MUCH COMMISSION WILL I EARN?
100% - Commission is paid directly to the agency from the carrier.

CAN MY AGENCY EARN PROFIT SHARE?
Yes.

DOES MY AGENCY OWN THE AGENCY CODE, POLICIES, AND EXPIRATIONS?
Yes, each member agency will own their code, policies, and expirations.

CAN I BELONG TO ANOTHER ALLIANCE OR NETWORK AND JOIN BIG "I" ALLIANCE GOLD?
No. We require members to commit exclusively to Big "I" Alliance Gold. (Big "I" Alliance Blue members are not restricted.)

WHEN GETTING NEW APPOINTMENTS, WILL I BE ABLE TO ACCESS THEM DIRECTLY?
Yes, you will have direct access and work on the carrier portal with their underwriting team.

HOW DO I GET STARTED?
Visit us online at independentagent.com/ALLIANCE to complete a pre-application.

APPLY TODAY AT INDEPENDENTAGENT.COM/ALLIANCE

State Marketing Resources

Gold State Email Templates

Messages are not consecutive. States may pick and choose among these messages or use the copy to create their own.

Alliance Gold State Email 1: New Benefit

Alliance Gold State Email 2: Go for Gold

Alliance Gold State Email 3: Is it Time?

Alliance Gold State Email 4: Join the Team

Alliance Gold State Email 5: Opportunity Knocks

Alliance Gold State Email 6: Let's Talk

[State] Product Availability as of [x]

PERSONAL LINES

- Acuity
- Branch
- Bristol West
- Foremost Choice
- Foremost Signature Agent 360
- Foremost Signature A85
- Jewellers Mutual
- Nationwide
- Openly
- Safeco
- Steadily
- Travelers

COMMERCIAL LINES

- Acuity
- Arlington Roe
- Berkley Management
- Bristol West
- Cowbell
- Employers
- Forge
- Jewellers Mutual
- Liberty Mutual
- Nationwide
- Pia Insurance
- Prospeller Benefits
- Travelers Commercial

LIFE AND HEALTH

- Group Life Insurance Services

BIGMEMBERALLIANCE.COM

Product Lists



Contacts

- [Tiffany Overlease](#)
Alliance Gold leader /target state liaison
- [Mary Venhaus](#)
Alliance Gold member support
- [Summer Cole](#)
Agency Development (formerly SOAR)/target state liaison
- [Nancy Dehercy](#)
Agency Development/Alliance Blue support
- [Paul Claussen](#)
Agency recruitment
- [Aimee Pineiro](#)
Big I Advantage® leader/target state liaison
- [Ginny Pierson](#)
State resources and support/target state liaison
- [Elif Wisecup](#)
Material customization

THANK YOU FOR ATTENDING

Questions?



BIGIMEMBERALLIANCE.COM

